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10/721,788	11/26/2003	Keisuke Kataoka	116692004800	4142
25227 7590 01/05/2009 MORRISON & FOERSTER LLP 1650 TYSONS BOULEVARD SUITE 400 MCLEAN, VA 22102				
EXAMINER				
ROBINSON BOYCE, AKIBA K				
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**Please find below and/or attached an Office communication concerning this application or proceeding.**

The time period for reply, if any, is set in the attached communication.

# Office Action Summary

**Application No.**

10/721,788

**Applicant(s)**

KATAOKA ET AL.

**Examiner**

AKIBA K. ROBINSON BOYCE

**Art Unit**

3628

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --  
**Period for Reply**

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

**Status**

- 1) ☒ Responsive to communication(s) filed on 23 October 2008.
- 2a) ☒ This action is **FINAL**. 2b) ☐ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

**Disposition of Claims**

- 4) ☒ Claim(s) 1-19 is/are pending in the application.
- 4a) Of the above claim(s) \_\_\_\_\_ is/are withdrawn from consideration.
- 5) ☐ Claim(s) \_\_\_\_\_ is/are allowed.
- 6) ☒ Claim(s) 1-19 is/are rejected.
- 7) ☐ Claim(s) \_\_\_\_\_ is/are objected to.
- 8) ☐ Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

**Application Papers**

- 9) ☐ The specification is objected to by the Examiner.
- 10) ☐ The drawing(s) filed on \_\_\_\_\_ is/are: a) ☐ accepted or b) ☐ objected to by the Examiner.  
Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).  
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

**Priority under 35 U.S.C. § 119**

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All b) ☐ Some \* c) ☐ None of:
1. ☐ Certified copies of the priority documents have been received.
  2. ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
  3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

\* See the attached detailed Office action for a list of the certified copies not received.

**Attachment(s)**

- 1) ☐ Notice of References Cited (PTO-892)
- 2) ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)
- 3) ☐ Information Disclosure Statement(s) (PTO/SI/08)  
Paper No(s)/Mail Date \_\_\_\_\_
- 4) ☐ Interview Summary (PTO-413)  
Paper No(s)/Mail Date \_\_\_\_\_
- 5) ☐ Notice of Informal Patent Application
- 6) ☐ Other: \_\_\_\_\_

## **DETAILED ACTION**

### ***Status of Claims***

1. Due to communications filed 10/23/08, the following is a final office action. Claims 1, 8, 10, 17 and 19 have been amended. Claims 1-19 are pending in this application and have been examined on the merits. Due to the amendment filed 10/23/08, the previous rejection has been withdrawn, and claims 1-19 are rejected as follows.

### ***Claim Rejections - 35 USC § 103***

2. The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

3. Claims 1-19 rejected under 35 U.S.C. 103(a) as being unpatentable over Anderson et al (US 7,046,789).

As per claim 1, Anderson et al discloses:

a first storing step of storing, by a management terminal that manages said representatives, representative information indicating a plurality of representatives, (Col. 18, lines 9-15, establishing call center resource data corresponding to a plurality of different resources where resources are analogous to representatives, w/ col. 18, lines 48-51, shows resource category includes individual agents. In this case, storing is inherent since a the system is computer-implemented, and information must be stored on a computer in order for it to be processed), and selection information indicating a

selected representative who is selected from the plurality of representatives by the user, (Col. 18, lines 34-36, receiving selections of selected statistic display options corresponding to resource categories, where resources include agents as shown in col. 6, lines 36-42);

a screen generating step of generating, by said management terminal, data of a first screen which indicates the selected representative that the selection information indicates, (Col. 18, lines 37-40, obtaining as a result of selected display options), where it is possible for the user to select on the screen, another representative than said selected representative, from said plurality of representatives that the representative information indicates, (Col. 17, lines 39-42, multiple statistics or screens can be opened simultaneously);

a screen sending step of sending, by said management terminal, data of said first screen to a user terminal operated by the user; and a displaying step of displaying, by said user terminal, the first screen by using the provided data of the first screen, (Col. 18, lines 41-43, displaying).

Anderson et al does not specifically disclose representatives *who are assigned* to an organization that a user belongs to, however, does disclose that each of the call center strategies include a plurality of goals having at last one user defined strategy threshold in col. 4, lines 64-66, thereby suggesting that the representatives of the call center are part of a call center organization that the user belongs, and are assigned to the organization since the user is responsible for defining strategy thresholds for the organization, and thus the users of the organization.

It would have been obvious to one of ordinary skill in the art at the time of the applicant's invention for representatives to be assigned to an organization that a user belongs to with the motivation of adding representatives to an organization in a defined manner.

As per claim 2, Anderson et al discloses:

an information sending step of sending, by the user terminal, representative change information indicating said another representative selected by the user to the management terminal, in a case where the user selects said another representative on the first screen, (Col. 8, lines 6-9, selection of one or more resources assigned to new profile); and

an updating step of updating, by the management terminal, the selection information, using the provided representative change information, and by this, setting said another representative that the user selected, as a newly selected representative, (col. 98, lines 24-36, modifications saved and applied to all resources applied to that relationship).

As per claim 3, Anderson et al discloses:

wherein the first screen is for displaying information of merchandise, which the management terminal provides, (Col. 18, lines 48-51, call tables, which can actually be physically manufactured in a call center setting since these can be put together by hand, and are therefore analogous to merchandise in a call center setting).

As per claim 4, Anderson et al discloses:

wherein the first screen is for inputting contact content to the selected representative from the user, and indicates the selected representative as a contact destination, (Col. 21, lines 15-16, shows [in response to] user input for call center resource data, where a call center manages contacts as shown in col. 18, lines 9-12).

As per claim 5, Anderson et al discloses:

a first providing step of providing contact content that the user input in the first screen, by said user terminal, to the management terminal, (Col. 21, lines 15-36, relationship manager for accessing call center resource data); and

a second providing step of providing, by the management terminal, the provided contact content to the selected representative, (col. 22, lines 16-19, providing call center resources to a user, which leads a user to take action, w/ col. 9, lines 3-6, message sent to agent is part of user action).

As per claim 6, Anderson et al discloses:

Further comprising an information sending step of sending, by the user terminal, contact destination change information indicating said another representative that the user selected, to the management terminal, in a case where the user selects another representative on the first screen, wherein the second providing step comprises a step of providing the contact content, by the management terminal, to said another representative that the contact change information indicates, (Col. 8, lines 6-9, selection of one or more resources assigned to new profile, w/col. 98, lines 24-36, modifications saved and applied to all resources applied to that relationship).

As per claim 7, Anderson et al discloses:

wherein the second providing step comprises a step of providing contact content from the user, by e-mail, (Col. 9, lines 7-8, Email notification).

As per claim 8, Anderson et al discloses:

a second storing step of storing, by the management terminal, user information concerning a plurality of users who belong to said organization, (Col. 1, lines 57-58, stores information pertaining to customer); and

a notifying step of notifying, by the management terminal, change of representative to each of the plurality of users that the user information indicates, in a case where at least one of the plurality of representatives, (Col 6, lines 53-62, generic actions in response to change in call center, where it is shown that an Email notification is a generic action in Col. 22, lines 12-13).

Anderson et al does not specifically disclose representatives who are assigned to the organization changes, however, does disclose that each of the call center strategies include a plurality of goals having at last one user defined strategy threshold in col. 4, lines 64-66, thereby suggesting that the representatives of the call center are part of a call center organization that the user belongs, and are assigned to the organization since the user is responsible for defining strategy thresholds for the organization, and thus the users of the organization.

It would have been obvious to one of ordinary skill in the art at the time of the applicant's invention for representatives who are assigned to the organization changes with the motivation of adding representatives to a changing organization in a defined manner.

As per claim 9, Anderson et al discloses:

wherein the notifying step comprises a step of notifying each of the plurality of users of the change of representative, by the management terminal sending e-mail indicating the change of the representative to each of the plurality of users, (Col. 22, lines 12-13, Email notification).

As per claim 10, Anderson et al discloses:

a memory, which stores representative information indicating a plurality of representatives, (Col. 18, lines 9-15, establishing call center resource data corresponding to a plurality of different resources where resources are analogous to representatives, w/ col. 18, lines 48-51, shows resource category includes individual agents. In this case, the memory is inherent since a the system is computer-implemented, and information must be stored on a computer in order for it to be processed), and selection information indicating a selected representative who is selected from the plurality of representatives by the user; (Col. 18, lines 34-36, receiving selections of selected statistic display options corresponding to resource categories)

a screen generating unit that generates data of a first screen, which displays the selected representative that the selection information indicates, (Col. 18, lines 37-40, obtaining as a result of selected display options), and which is possible for the user to select another representative than said selected representative on the



first screen, (Col. 17, lines 39-42, multiple statistics or screens can be opened simultaneously); and

a screen sending unit which sends data of the first screen to a user terminal that the user uses, so that the first screen is displayed on the user terminal, (Col. 18, lines 41-43, displaying);

Anderson et al does not specifically disclose representatives *who are assigned* to an organization that a user belongs to, however, does disclose that each of the call center strategies include a plurality of goals having at last one user defined strategy threshold in col. 4, lines 64-66, thereby suggesting that the representatives of the call center are part of a call center organization that the user belongs, and are assigned to the organization since the user is responsible for defining strategy thresholds for the organization, and thus the users of the organization.

It would have been obvious to one of ordinary skill in the art at the time of the applicant's invention for representatives to be assigned to an organization that a user belongs to with the motivation of adding representatives to an organization in a defined manner.

As per claim 11, Anderson et al discloses:

Further comprising an updating unit, which updates the selection information, using representative change information provided from the user terminal indicating said another representative that the user selected, (Col. 8, lines 6-9, selection of one or more resources assigned to new profile), and by this, sets said another representative that the user selected as a newly selected representative, in a

case where the user selects said another representative on the first screen, (col. 98, lines 24-36, modifications saved and applied to all resources applied to that relationship).

As per claim 12, Anderson et al discloses:

Wherein the first screen indicates information of merchandise, which the management terminal provides, (Col. 18, lines 48-51, call tables, which can actually be physically manufactured in a call center setting since these can be put together by hand, and are therefore analogous to merchandise in a call center setting).

As per claim 13, Anderson et al discloses:

Wherein the first screen is for inputting contact content to the selected representative from the user, and indicates the selected representative as the contact destination, (Col. 21, lines 15-16, shows [in response to] user input for call center resource data, where a call center manages contacts as shown in col. 18, lines 9-12).

As per claim 14, Anderson et al discloses:

a providing unit that provides the contact content which is input on the first screen by the user, and is provided from the user terminal, to the selected representative, (Col. 21, lines 15-36, relationship manager for accessing call center resource data, w/col. 22, lines 16-19, providing call center resources to a user, which leads a user to take action, w/ col. 9, lines 3-6, message sent to agent is part of user action).

As per claim 15, Anderson et al discloses:

Wherein the providing unit provides the contact content to another representative, which is indicated by a contact destination change information indicating said another representative that the user selected on the first screen, and which is provided from the user terminal, in a case where the user selects said another representative on the first screen, (Col. 8, lines 6-9, selection of one or more resources assigned to new profile, w/col. 98, lines 24-36, modifications saved and applied to all resources applied to that relationship).

As per claim 16, Anderson et al discloses:

Wherein the providing unit provides the contact content from the user terminal, by e-mail, (Col. 9, lines 7-8, Email notification).

As per claim 17, Anderson et al discloses:

Wherein said memory stores user information concerning a plurality of users who belong to said organization, (Col. 1, lines 57-58, stores information pertaining to customer), and said management terminal further comprises a notifying unit which notifies change of representative to each of the plurality of users that the user information indicates, in a case where at least one of the plurality of representatives, (Col 6, lines 53-62, generic actions in response to change in call center, where it is shown that an Email notification is a generic action in Col. 22, lines 12-13).

Anderson et al does not specifically disclose representatives *who are assigned to* an organization that a user belongs to, however, does disclose that each of the call center strategies include a plurality of goals having at last one user defined strategy

threshold in col. 4, lines 64-66, thereby suggesting that the representatives of the call center are part of a call center organization that the user belongs to, and are assigned to the organization since the user is responsible for defining strategy thresholds for the organization, and thus the users of the organization.

It would have been obvious to one of ordinary skill in the art at the time of the applicant's invention for representatives to be assigned to an organization that a user belongs to with the motivation of adding representatives to an organization in a defined manner.

As per claim 18, Anderson et al discloses:

Wherein said notifying unit notifies each of the plurality of users of the change of representative, by sending e-mail indicating the change of representative to each of the plurality of users, (Col. 22, lines 12-13, Email notification).

As per claim 19, Anderson et al discloses:

a memory which stores representative information indicating a plurality of representatives, (Col. 18, lines 9-15, establishing call center resource data corresponding to a plurality of different resources where resources are analogous to representatives, w/ col. 18, lines 48-51, shows resource category includes individual agents. In this case, the memory is inherent since the system is computer-implemented, and information must be stored on a computer in order for it to be processed), and selection information indicating a selected representative who is selected from the plurality of representatives by the user, (Col. 18, lines 34-36,

receiving selections of selected statistic display options corresponding to resource categories);

a screen generating unit that generates data of a first screen, which displays the selected representative that the selection information indicates, (Col. 18, lines 37-40, obtaining as a result of selected display options); and

and which is possible for the user to select another representative than said selected representative, (Col. 17, lines 39-42, multiple statistics or screens can be opened simultaneously); and

a screen sending unit which sends data of the first screen to a user terminal that the user uses, so that the first screen is displayed on the user terminal, (Col. 18, lines 41-43, displaying);

Anderson et al does not specifically disclose representatives *who are assigned* to an organization that a user belongs to, however, does disclose that each of the call center strategies include a plurality of goals having at last one user defined strategy threshold in col. 4, lines 64-66, thereby suggesting that the representatives of the call center are part of a call center organization that the user belongs, and are assigned to the organization since the user is responsible for defining strategy thresholds for the organization, and thus the users of the organization.

It would have been obvious to one of ordinary skill in the art at the time of the applicant's invention for representatives to be assigned to an organization that a user belongs to with the motivation of adding representatives to an organization in a defined manner.

***Response to Arguments***

4. Applicant's arguments filed 10/23/08 have been fully considered but they are not persuasive.

Applicant argues that the user disclosed in Anderson does not appear to be the user recited in claims 1, 10 and 19, and amended claims to now recite "representatives *who are assigned* to an organization that a user belongs to" in order to clarify who the user is. However, as discussed above in the rejection, Anderson et al does disclose that each of the call center strategies include a plurality of goals having at last one user defined strategy threshold in col. 4, lines 64-66, thereby suggesting that the representatives of the call center are part of a call center organization that the user belongs, and are assigned to the organization since the user is responsible for defining strategy thresholds for the organization, and thus the users of the organization.

***Conclusion***

5. Applicant's amendment necessitated the new ground(s) of rejection presented in this Office action. Accordingly, **THIS ACTION IS MADE FINAL**. See MPEP § 706.07(a). Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

A shortened statutory period for reply to this final action is set to expire THREE MONTHS from the mailing date of this action. In the event a first reply is filed within TWO MONTHS of the mailing date of this final action and the advisory action is not

mailed until after the end of the THREE-MONTH shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than SIX MONTHS from the date of this final action.

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Akiba K Robinson-Boyce whose telephone number is 571-272-6734. The examiner can normally be reached on Monday-Friday 9am-5:30pm.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, John Hayes can be reached on 571-272-6708. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300. Information regarding the status of an application may be obtained from the

•Patent Application Information Retrieval (PAIR) system, Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

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Any inquiry of a general nature or relating to the status of this application or proceeding should be directed to the receptionist whose telephone number is 703-305-3900.

A. R. B.

January 5, 2009

/Akiba K Robinson-Boyce/

Primary Examiner, Art Unit 3628